

Amended Returns

This information presumes you have the original return in TaxWise®. Amended returns cannot be electronically filed.

- Open the original return in TaxWise®. If the return was previously adjusted by the IRS, modify the original return to match the changes the IRS made before opening Form 1040X.
- Using the process for adding a form, select 1040X Pg 1 from the list. Add the state amended return forms if the taxpayer is required to correct that return as well.
- On the Form 1040X and the state's amended return form, if applicable, check the box at the top to override the original refund or balance due before making changes to any forms.
- Starting with the Main Information Sheet, confirm the address, filing status and exemptions from the original return and make any appropriate changes such as adding or removing dependents. Add additional Forms W-2, other income documents or credit information as if you are preparing the original return.
- TaxWise® will complete the Form 1040X Part I based on changes to the tax return. In Part III, provide an explanation for filing Form 1040X such as receiving another Form W-2 after filing the original return or forgetting to claim the child tax credit. Identify the line numbers that changed in Part I as well. In the state amendment, press on the space bar on each line of the explanation to copy the explanation from the federal amendments.
- Review the forms tree on the left for any red marks and fix them.
- Secure the taxpayer's signature on this form and provide them with the appropriate mailing address from the Form 1040X Instructions.
- When mailing the amended return to the IRS, do **not** include copies of the original return. **Do** include copies of any revised schedules or additional Forms W2 or 1099. If taxable Social Security changes, also include the Form 1040 with "Amendment" written across it. The state amendment should include a copy of everything sent with the federal amended return.
- Taxpayer should receive a copy of all documents to retain for their records.

TaxWise® Hint: To Open the original read-only version of the return, click on [File,Return Version]. You can then close the current version (as revised) or a previous version by date completed.